



Benefits Personal Data Overview

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take on the Benefits Personal Data page before enrolling an employee in Medicare benefits.

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The Benefits Personal Data Page

Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

1. Access the **Benefits Personal Data** page using the following path:

Navigator > Benefits > Employee/Dependent Information > Benefits Personal Data

The **Benefits Personal Data Search** page appears.

< Cardinal Homepage Benefits Personal Data

Benefits Personal Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: Empl ID begins with

☐ Include History

Limit the number of results to (up to 300): 300

Search Advanced Search

2. Enter the Employee ID in the **Empl ID** field.

< Cardinal Homepage Benefits Personal Data

Benefits Personal Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: Empl ID begins with

☐ Include History

Limit the number of results to (up to 300): 300

Search Advanced Search

Note: You can also search by entering the beginning of the Name, or other search criteria using the corresponding drop-down options. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Cardinal security restricts the user to seeing only their agency employees.

- Click the **Search** button.



Cardinal Homepage Benefits Personal Data

Benefits Personal Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

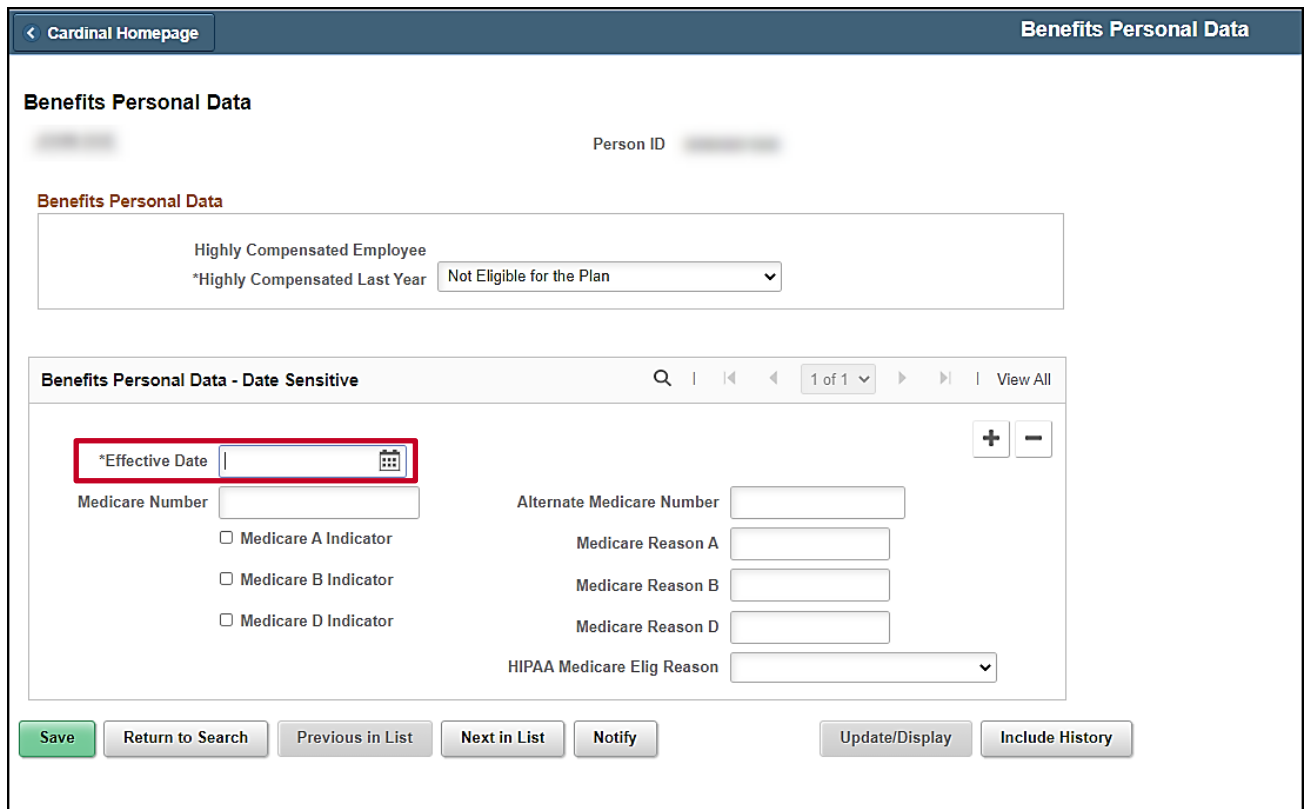
Search by: Empl ID begins with

☐ Include History

Limit the number of results to (up to 300): 300

Search [Advanced Search](#)

- Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field on the **Benefits Personal Data** page.



Cardinal Homepage Benefits Personal Data

Benefits Personal Data

Person ID XXXXXXXXXX

Benefits Personal Data

Highly Compensated Employee

*Highly Compensated Last Year Not Eligible for the Plan

Benefits Personal Data - Date Sensitive 1 of 1 View All

*Effective Date

Medicare Number

☐ Medicare A Indicator
☐ Medicare B Indicator
☐ Medicare D Indicator

Alternate Medicare Number

Medicare Reason A

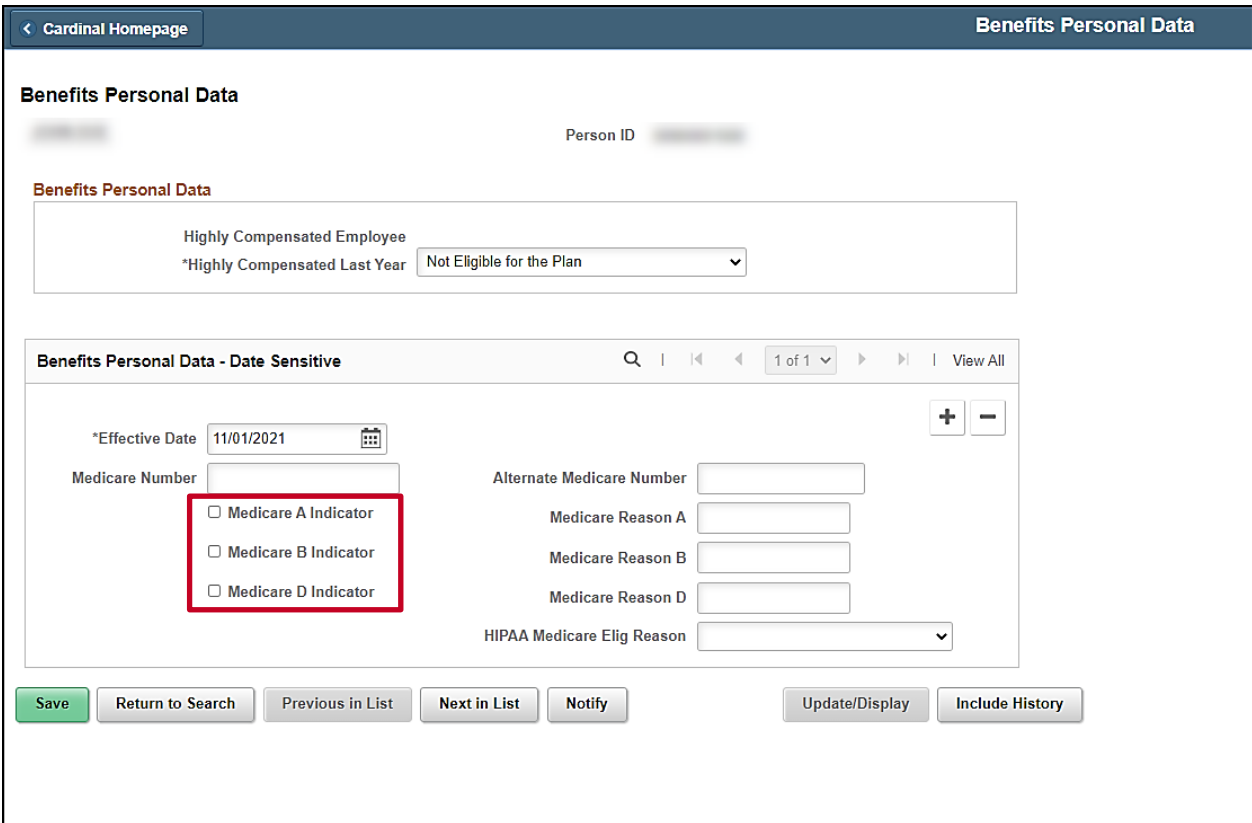
Medicare Reason B

Medicare Reason D

HIPAA Medicare Elig Reason ▼

[Save](#)
[Return to Search](#)
[Previous in List](#)
[Next in List](#)
[Notify](#)
[Update/Display](#)
[Include History](#)

5. Check the boxes next to **Medicare A** and **Medicare B**.



Cardinal Homepage Benefits Personal Data

Benefits Personal Data

Person ID

Benefits Personal Data

Highly Compensated Employee

*Highly Compensated Last Year Not Eligible for the Plan

Benefits Personal Data - Date Sensitive

*Effective Date 11/01/2021

Medicare Number

Alternate Medicare Number

Medicare Reason A

Medicare Reason B

Medicare Reason D

HIPAA Medicare Elig Reason

Medicare A Indicator

Medicare B Indicator

Medicare D Indicator

Save Return to Search Previous in List Next in List Notify Update/Display Include History

Note: Both need to be checked for the employee to be enrolled in Medicare.

6. Select the corresponding **HIPAA Medicare Elig Reason**:
- Age
 - Disability
 - End Stage Renal Disease

Cardinal Homepage
Benefits Personal Data

Benefits Personal Data

Person ID

Benefits Personal Data

Highly Compensated Employee
*Highly Compensated Last Year
Not Eligible for the Plan

Benefits Personal Data - Date Sensitive

*Effective Date
11/01/2021

+
-

Medicare Number

☒ Medicare A Indicator
☒ Medicare B Indicator
☐ Medicare D Indicator

Alternate Medicare Number

Medicare Reason A
Medicare Reason B
Medicare Reason D

HIPAA Medicare Elig Reason

Save
Return to Search
Previous in List
Next in List
Notify

Update/Display
Include History

- Click the **Save** button.

Cardinal Homepage
Benefits Personal Data

Benefits Personal Data

Person ID

Benefits Personal Data

Highly Compensated Employee
*Highly Compensated Last Year
Not Eligible for the Plan

Benefits Personal Data - Date Sensitive

*Effective Date
11/01/2021

+
-

Medicare Number

☒ Medicare A Indicator
☒ Medicare B Indicator
☐ Medicare D Indicator

Alternate Medicare Number

Medicare Reason A
Medicare Reason B
Medicare Reason D

HIPAA Medicare Elig Reason
Age

Save
Return to Search
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Notify

Update/Display
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Rev 9/7/2021

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